PDS TimeTrack

User

Manual

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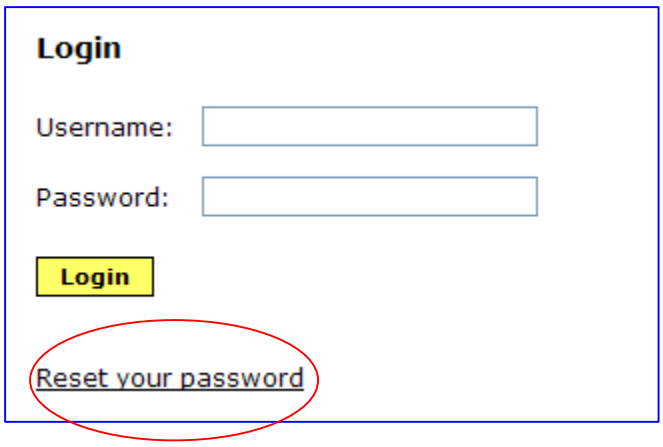
General Information

Login and URL



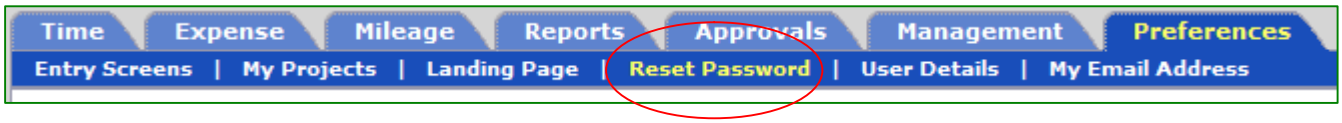
https://asp01.journyx.com/pdstech/jtcgi/wte.pyc

As a manager or timesheet approver, the username and password used to login is created by PDS and emailed directly to you upon initial setup.

Password Maintenance

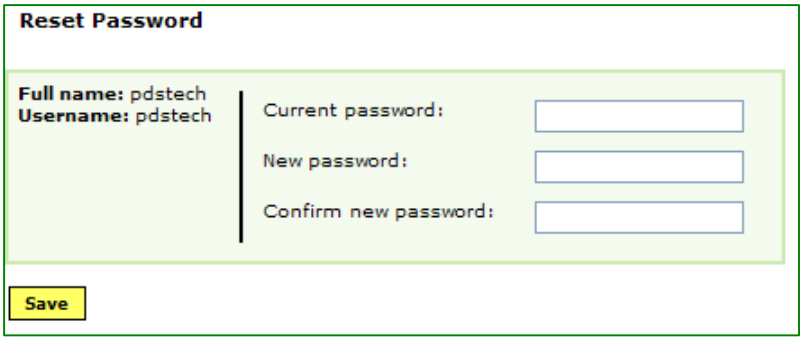
To reset a password when it is unknown, click on the "Reset your password" option from the login screen as shown above.

If the password is known and you wish to update/change your password, the Reset Password feature is located under Preferences-->Reset Password menu as shown below.



The Reset Password screen displays your full name and username as shown in the system and on reports. You have the ability to modify your password if you wish.

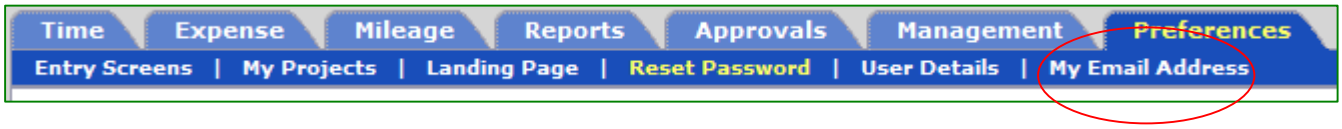
To modify your password, you must specify your current password for security purposes. Then specify your new password that you would like to use when logging into the system. Confirm your new password by entering it again.



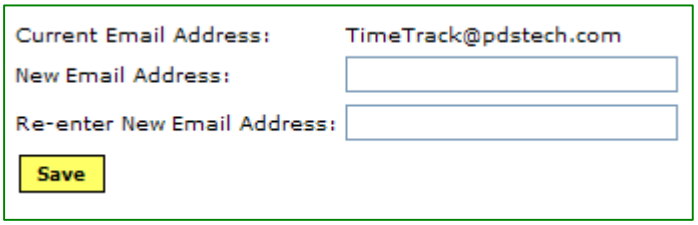
When finished, click the Save button. Your password will be changed and you will have to use the new password the next time you login to the system.

Email Maintenance

To update or change the email address used for the automatic timesheet notifications, click on the “My Email Address” option located under Preferences menu as shown below.



The Current Email Address being used for the notifications is displayed below.



To update / change the email address input the new email address in both fields and click the “Save” button. The screen will refresh and reflect the new email address.

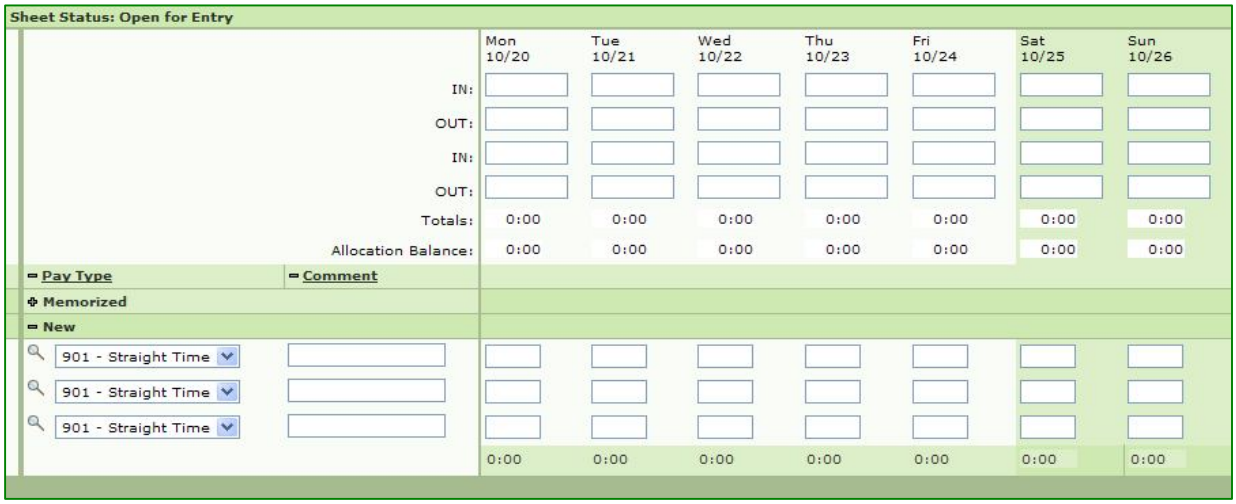
Timesheet Entry

Overview

Time Entry is located under the primary tab labeled Time as shown below and allows you to input the hours that you worked on a single timesheet. Timesheet enables all employees to input their hours and electronically submit them for review and approval by their manager. The email notification system includes the following employee prompts:

Notification Description / Reason	Sent To:
Timesheet is due to be submitted	Employee
Timesheet needs to be approved	Approver
Timesheet has been approved	Employee
Timesheet has been rejected	Employee
Timesheet has been resubmitted	Approver
Timesheet is late or has not been submitted	Employee and Approver
Timesheet has been submitted, but not approved by deadline	Backup Approver

Timesheet Example



Timesheet Pay Periods

You can view your time for a single day or an entire period. Time Entry displays the period view by default. You may use the Date Arrow Icons (▣) to move backward or forward one period at a time. To enter time for a single day, go to Time-->View Day.

To enter time or view hours for a different day, use the Calendar in the Toolbar to jump to that day. Alternatively, you may use the Date Arrow Icons to move backward or forward one day at a time.

Keep in mind that timesheets are configured based on your role within the organization so your timesheet may vary in appearance and functionality from the one shown. The timesheet shown on the previous page is for hourly employees.

Users are able to enter time as discreet units of time that are associated with individual Projects, Tasks, Pay Types and Bill Types. Additionally, each of these time entries may also have a text comment associated with it to further specify the nature of the hours logged.

Time entry calculations

All timesheets will require you select a Pay Type. To create a time entry, select a value from each of the dropdowns shown on your timesheet. You also have the ability to specify a Comment for the time entry.

Once everything has been selected, specify the hours worked for that project on a specific date. Your timesheet will accept hour entries in HH:MM (2:35) format and convert it to decimal format (1.25 = 1:15) before processing the hours in payroll. Hours entered in decimal format will convert to HH:MM, rounding to the nearest whole minute. Values 0.5 and higher will be rounded up; values 0.49 and lower will be rounded down.

Saving Timesheet Entries

Click the Save button at the bottom of the time entry grid. The timesheet will refresh and your entries will now appear in the Current section. You may add hours to this entry either in the same day or in another day in the time period that is currently displayed.

You may create more than one time record at a time. Simply create the actual time entries for different days and/or different combinations of items and then click the Save button at the bottom of the timesheet. The timesheet will refresh and your entries will now appear in the Current section.

Edit Timesheet Entries

Click the Edit Icon ( ) to the left of the respective entry. This will refresh the screen and allow you to change the Project, Task, Pay Type, and Bill Type. You can also modify your Comment associated with the entry.

Delete Timesheet Entries

Click the Delete Icon ( ), a trash can, to the right of the respective time entry. The screen will refresh with the time entry having been removed.

Entering In/Out Times

For hourly employees, your timesheet has been configured to contain the Time In/Out feature. If so, this feature allows you to manually log the time that you begin and end your work day. You have the ability to log in and out multiple times in a single day in order to capture actual hours work that reflect any lunch breaks.

To log the beginning of your work day, simply specify the time in the In field, including an 'a or 'p for a.m. or p.m. of the respective date. To log out, specify the time in the Out field of the respective date. At the bottom of the Time In/Out module, you will see the total hours from logging in and out for your work day.

Along with entering your Time In/Out, you also have the standard timesheet features to enter the number of hours for specific pay types for the day. At the bottom of the standard timesheet module, you will see the total hours from entering the In/Out times. It is required that the total Time In/Out hours equal the total time spent on specific pay types for the day.

Submitting Timesheets for Approval

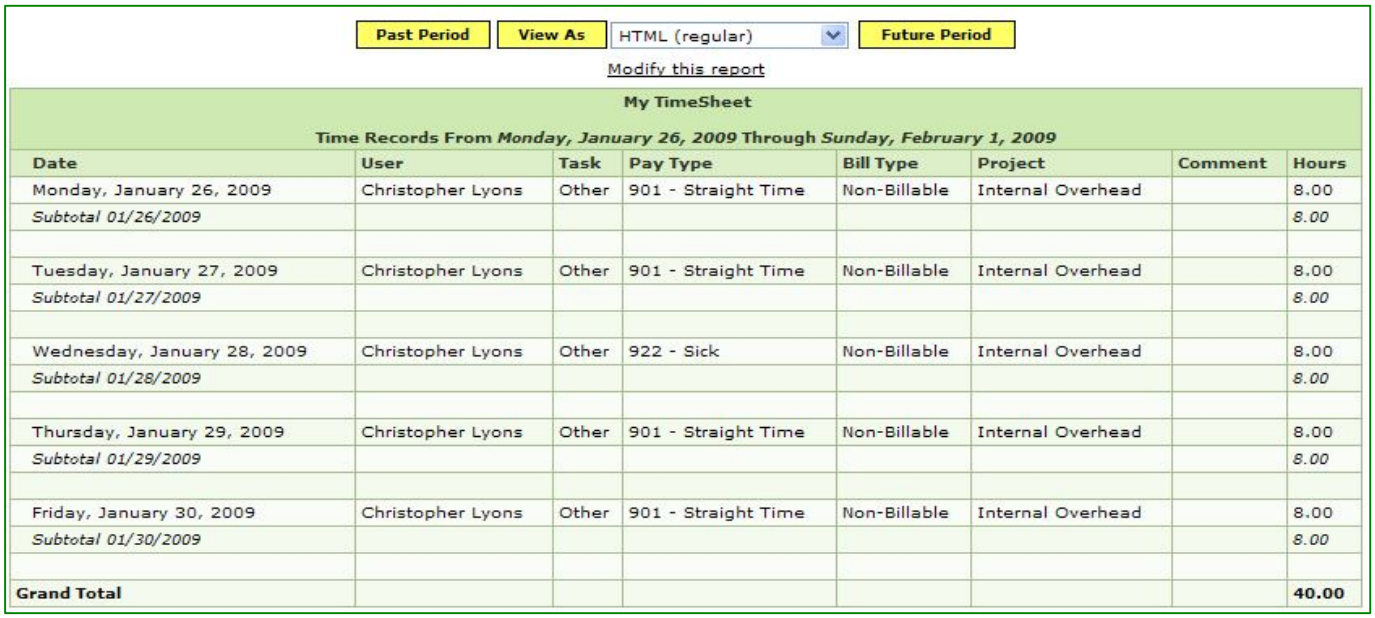
From your timesheet, you can click the Submit for Approval button to submit your timesheet to your supervisor. This button will only appear on your timesheet if your company is using Approval Plans and if you have an approval plan assigned to you.

Once a timesheet has been submitted for approval, you may not alter any of the time records contained in that timesheet. Therefore, do not submit your timesheet until you have finished all time entry for the time period in question. For more information on the Approvals process, please see the Approvals section of this manual.

Viewing Timesheets

View Time Report

This report displays information regarding the time records that have been saved for this time period. The top of the report screen includes four buttons for manipulating the Time Report.


Past Period | View As | HTML (regular) | Future Period

Modify this report

My TimeSheet

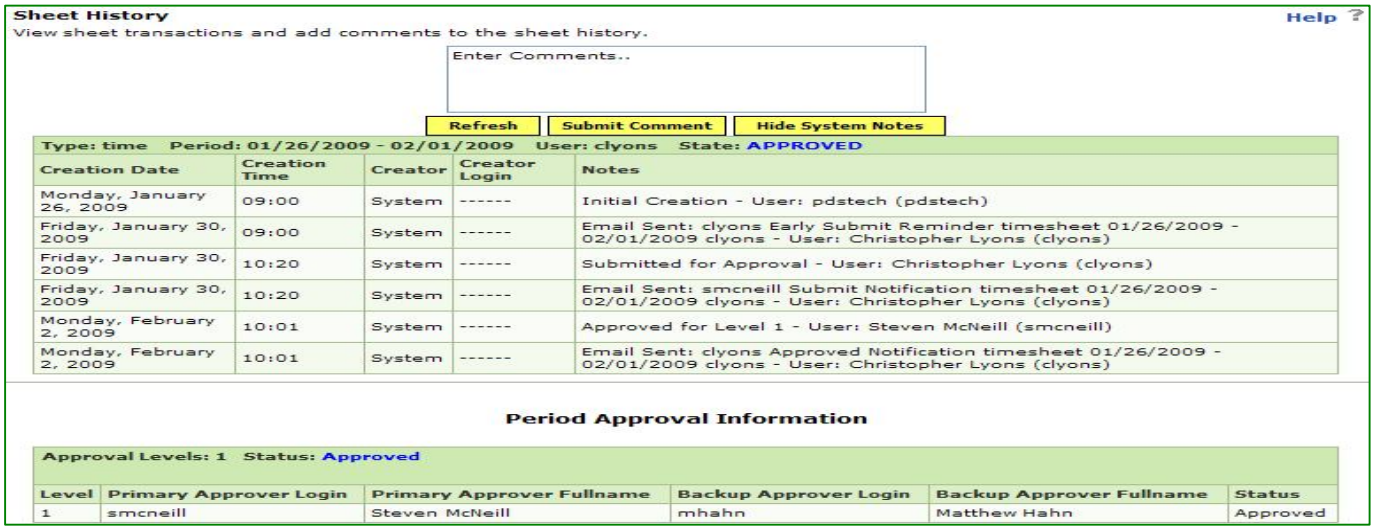
Time Records From *Monday, January 26, 2009* Through *Sunday, February 1, 2009*

Date	User	Task	Pay Type	Bill Type	Project	Comment	Hours
Monday, January 26, 2009	Christopher Lyons	Other	901 - Straight Time	Non-Billable	Internal Overhead		8.00
Subtotal 01/26/2009							*8.00*
Tuesday, January 27, 2009	Christopher Lyons	Other	901 - Straight Time	Non-Billable	Internal Overhead		8.00
Subtotal 01/27/2009							*8.00*
Wednesday, January 28, 2009	Christopher Lyons	Other	922 - Sick	Non-Billable	Internal Overhead		8.00
Subtotal 01/28/2009							*8.00*
Thursday, January 29, 2009	Christopher Lyons	Other	901 - Straight Time	Non-Billable	Internal Overhead		8.00
Subtotal 01/29/2009							*8.00*
Friday, January 30, 2009	Christopher Lyons	Other	901 - Straight Time	Non-Billable	Internal Overhead		8.00
Subtotal 01/30/2009							*8.00*
Grand Total							**40.00**

The Past Period and Future Period buttons allow you to view reports for periods in the past or future. The View As button allows you to see the Time Report in different formats depending on your needs.

View Sheet History

Sheet History contains notes regarding the timesheet and the approval process for that specific timesheet. The Sheet History link is located in the Additional Options section at the bottom of your timesheet. Clicking the Sheet History link will launch a pop-up window containing all the actions associated with the timesheet to date.



Sheet History Help

View sheet transactions and add comments to the sheet history.

Enter Comments..

Refresh | Submit Comment | Hide System Notes

Type: time Period: 01/26/2009 - 02/01/2009 User: clyons State: APPROVED

Creation Date	Creation Time	Creator	Creator Login	Notes
Monday, January 26, 2009	09:00	System	------	Initial Creation - User: pdstech (pdstech)
Friday, January 30, 2009	09:00	System	------	Email Sent: clyons Early Submit Reminder timesheet 01/26/2009 - 02/01/2009 clyons - User: Christopher Lyons (clyons)
Friday, January 30, 2009	10:20	System	------	Submitted for Approval - User: Christopher Lyons (clyons)
Friday, January 30, 2009	10:20	System	------	Email Sent: smcneill Submit Notification timesheet 01/26/2009 - 02/01/2009 clyons - User: Christopher Lyons (clyons)
Monday, February 2, 2009	10:01	System	------	Approved for Level 1 - User: Steven McNeill (smcneill)
Monday, February 2, 2009	10:01	System	------	Email Sent: clyons Approved Notification timesheet 01/26/2009 - 02/01/2009 clyons - User: Christopher Lyons (clyons)

Period Approval Information

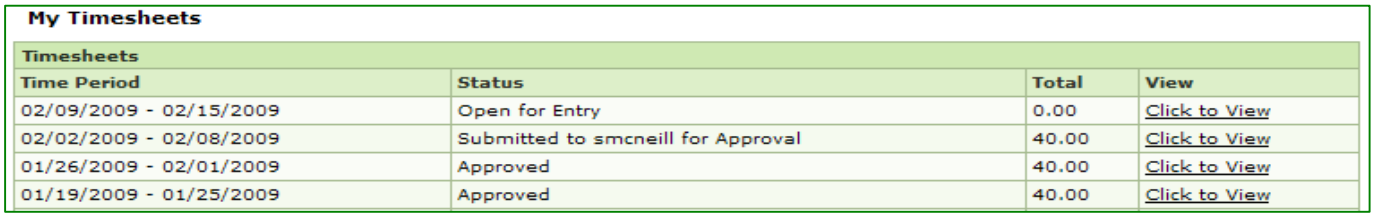
Approval Levels: 1 Status: Approved

Level	Primary Approver Login	Primary Approver Fullname	Backup Approver Login	Backup Approver Fullname	Status
1	smcneill	Steven McNeill	mhahn	Matthew Hahn	Approved

You can insert a note in the sheet history (i.e., for approvers) by specifying the text in the available textbox and clicking the Submit Comment button.

Historical Timesheets

Your past and present timesheets can be viewed under Management-->My Sheets-->Time (see figure 29.11). Here you will see a list of timesheets with their relevant periods and current status. You can view the details of the timesheet by clicking the link labeled 'Click to View'.



My Timesheets

Timesheets

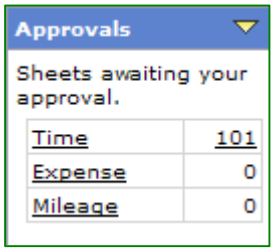
Time Period	Status	Total	View
02/09/2009 - 02/15/2009	Open for Entry	0.00	Click to View
02/02/2009 - 02/08/2009	Submitted to smcneill for Approval	40.00	Click to View
01/26/2009 - 02/01/2009	Approved	40.00	Click to View
01/19/2009 - 01/25/2009	Approved	40.00	Click to View

Timesheet Approvals

Overview

Time Approvals allow approvers within your organization to approve or reject users' timesheets for a particular period. After user submission, the timesheet enters the approval process and the designated approvers have approval/rejection authority over the timesheet. This section specifically discusses approving or rejecting timesheets that have been submitted by users.

Approving Timesheets



If you have approving authority for particular users' timesheets, you can see a summary of what is awaiting your approval in the Approvals section of the Toolbar as shown below.

Clicking the Time link will display the Time Approvals section in the workspace to the right of the Toolbar (see figure 26.2). Time Approvals is also located under Approvals-->Time.

From this screen, you are able to approve and reject timesheets that are in your queue. You must first specify the search criteria for the users that you wish to approve or reject timesheets for.

You have the option to also select whether to filter for sheets awaiting your approval, all sheets, or sheets awaiting your backup approval. When finished specifying the search criteria, click the Search button. The search results will be displayed underneath the criteria.

Approve timesheets - select the timesheets and click the Approve button

Reject timesheets - select the timesheets, specify a rejection reason, and click the Reject button.

View user's timesheet - Click the respective date link under the Period column.

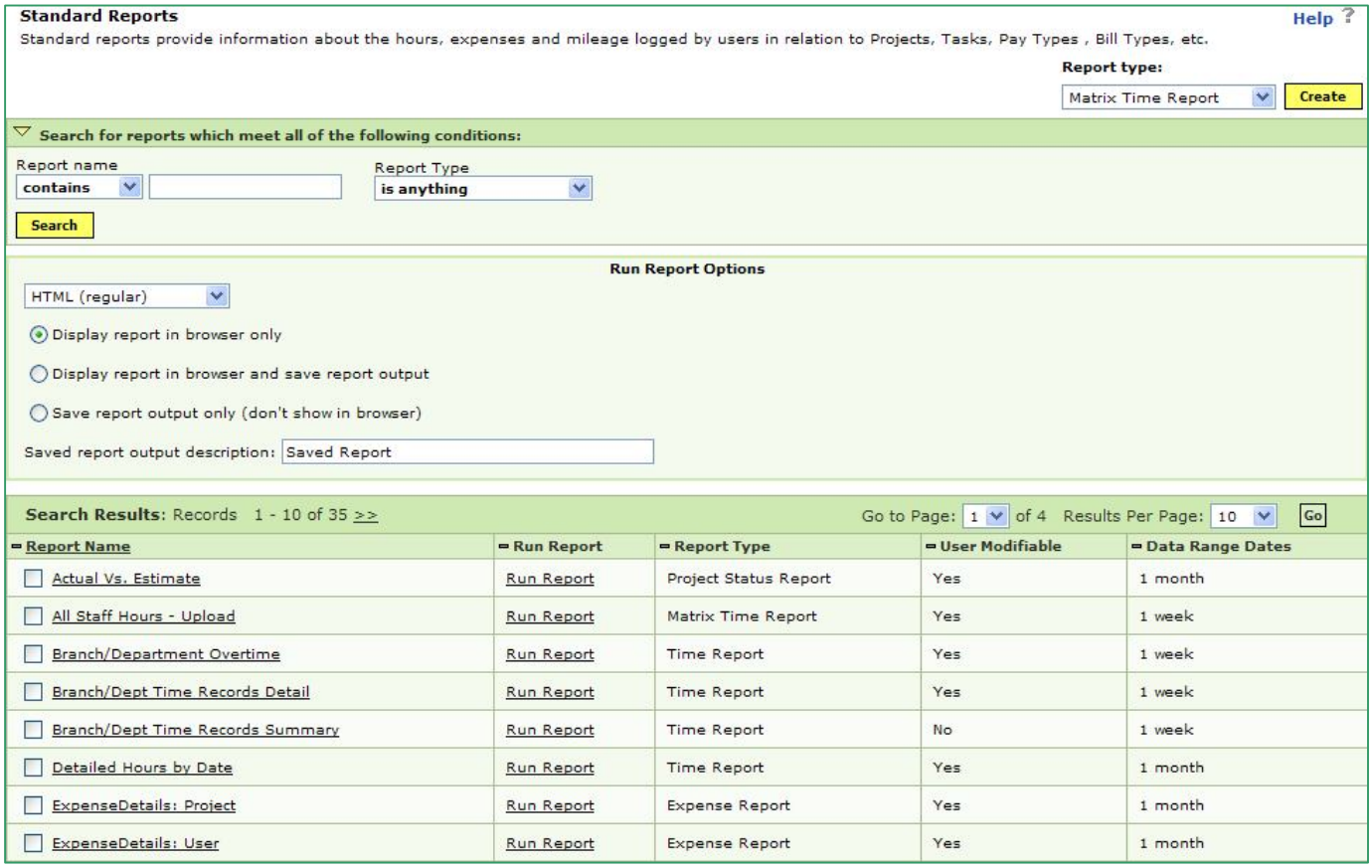
Reporting

Overview

The reporting functionality is located under the primary tab labeled Reports and is limited based on your role within the company. The main reporting sections are Standard Reports, Scheduled Reports, Saved Reports, Sheet Status Reports, and System Reports.

Standard Reports

Standard Reports is located under Reports-->Standard Reports (as shown below).


Standard Reports
Help
Standard reports provide information about the hours, expenses and mileage logged by users in relation to Projects, Tasks, Pay Types , Bill Types, etc.
Report type:
Matrix Time Report
Create
Search for reports which meet all of the following conditions:
Report name
contains
Report Type
is anything
Search
Run Report Options
HTML (regular)
Display report in browser only
Display report in browser and save report output
Save report output only (don't show in browser)
Saved report output description: Saved Report
Search Results: Records 1 - 10 of 35 >>
Go to Page: 1 of 4 Results Per Page: 10
Go
Report Name | Run Report | Report Type | User Modifiable | Data Range Dates
Actual Vs. Estimate | Run Report | Project Status Report | Yes | 1 month
All Staff Hours - Upload | Run Report | Matrix Time Report | Yes | 1 week
Branch/Department Overtime | Run Report | Time Report | Yes | 1 week
Branch/Dept Time Records Detail | Run Report | Time Report | Yes | 1 week
Branch/Dept Time Records Summary | Run Report | Time Report | No | 1 week
Detailed Hours by Date | Run Report | Time Report | Yes | 1 month
ExpenseDetails: Project | Run Report | Expense Report | Yes | 1 month
ExpenseDetails: User | Run Report | Expense Report | Yes | 1 month

Customizing Reports

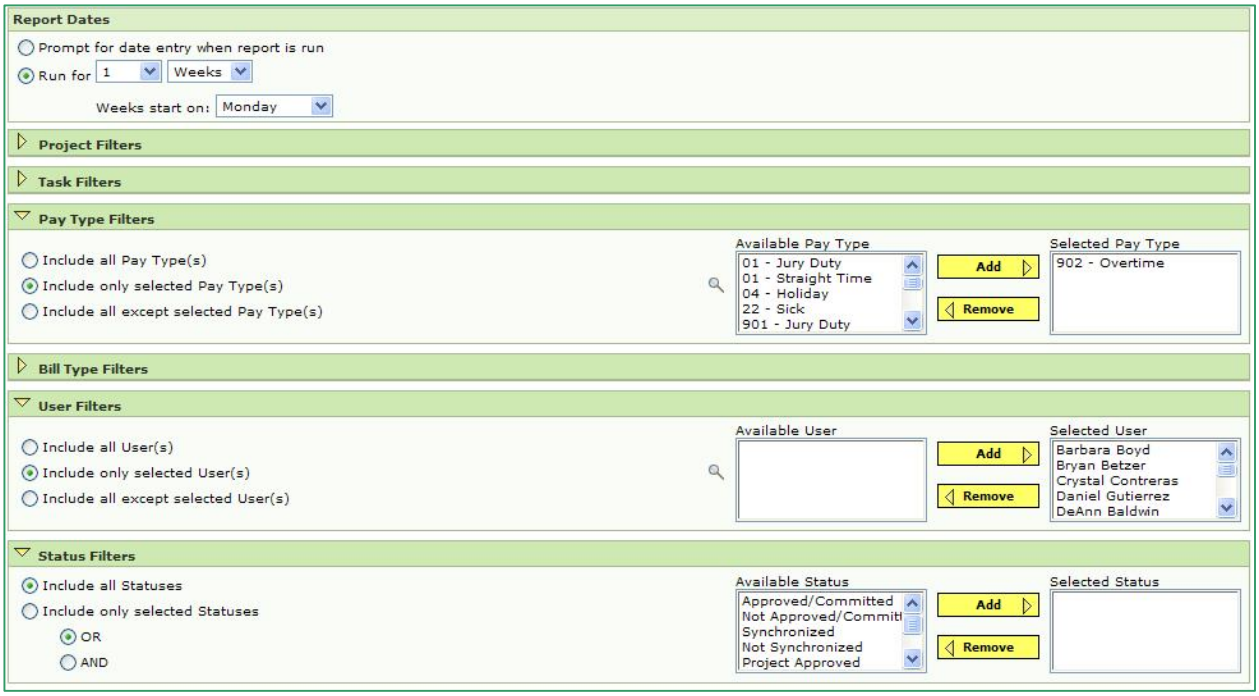
The majority of the reports listed come standard with the PDS TimeTrack timesheet tool and are modifiable to the needs of each individual user. The following is a list of reports customized by PDS and made available to you:

- Branch/Department Overtime
- Branch/Dept Time Records Detail
- Branch/Dept Time Records Summary

Clicking on the Report name will allow you to modify any of the following filters associated with that report:

- Report Dates – periods covered in the report
- Projects – Clients (not currently used by PDS)
- Tasks – Work Activities (not currently used by PDS)
- Pay Types – Various paycodes for hourly and salary employees
- Bill Types – Not currently used by PDS

- Users – Individuals you have access to as a manager/reporter
- Status – Status assigned to the time records



"Selected" items indicate the value/parameter has already been added to the report and will affect the reports output. To remove any of these items, highlight the item on the right and click the "Remove" button. Holding down the "Ctrl" key will allow the selection of multiple items.

"Available" items indicate those values/parameters available to be added to the report. To add items to the report, highlight the desired item and click "Add". This will move the item from the available to the selected column.

If no items are listed in the available list, then there are too many available items to list and typically is only associated with users/employees. Clicking on the magnifying glass will launch the Search Users dialogue box shown on the following page.

Click on the Search Options arrow to expand the section. Find your department/branch on the Group list and select that item. The list below will refresh with only those employees associated with that group.

Click an individual item or select all if desired and you will be returned to the reports parameter screen with these values in the available items list. Click "Add" to select the items for the report and then click "Save" at the bottom of the screen.

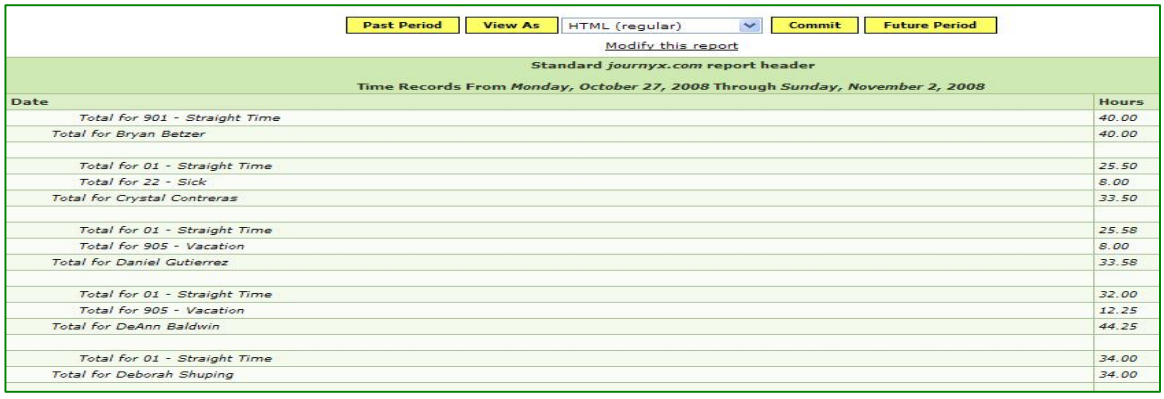
Running a Report

To run a report, you must select the output format for that report. There are four main output formats for time reports:

- HTML Reports - display the data as web pages that are optimized for screen display and viewing.
- HTML Printable - are similar to HTML Reports but have been optimized for printing purposes.
- Plain Text (Exported) - produce output which has been designed to be saved to your computer's hard drive
- Cube Reports - are designed for use with Microsoft Office and Microsoft Internet Explorer.

The report output will appear based on the option chosen from above. Once you have identified the report to run and have indicated which report output format you desire, simply click the Run Report link next to the selected report.

An HTML report appears below. Past Period and Future Period buttons navigate to desired period.


Past Period
View As
HTML (regular)
Commit
Future Period
Modify this report
Standard journyx.com report header
Time Records From Monday, October 27, 2008 Through Sunday, November 2, 2008
Date
Hours
Total for 901 - Straight Time 40.00
Total for Bryan Betzer 40.00
Total for 01 - Straight Time 25.50
Total for 22 - Sick 8.00
Total for Crystal Contreras 33.50
Total for 01 - Straight Time 25.58
Total for 905 - Vacation 8.00
Total for Daniel Gutierrez 33.58
Total for 01 - Straight Time 32.00
Total for 905 - Vacation 12.25
Total for DeAnn Baldwin 44.25
Total for 01 - Straight Time 34.00
Total for Deborah Shuping 34.00

The "Modify this report" link to return to the report filter screen to make any additional changes.

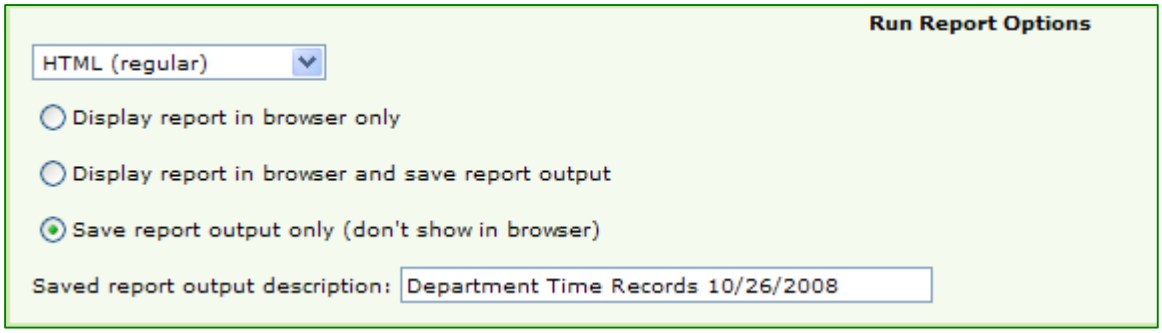
Saved Reports

You can save the output of a report with a fixed date range for later viewing. Saved reports can also be copied to other users or even emailed to other individuals, even if they are not Timesheet users. The following section describes all of these functions.

Saving Reports

To save a report in Timesheet, select either 'Display report in browser and save report output' or 'Save report output only' without displaying in browser (see figure 28.2).

Additionally, you must designate a name for the saved report for identification purposes as shown below.


Run Report Options
HTML (regular)
Display report in browser only
Display report in browser and save report output
Save report output only (don't show in browser)
Saved report output description:
Department Time Records 10/26/2008

Once you have selected the report format, chosen the method for saving and specified the name, click the Run Report link next to the selected report. The report will run and the output will be saved for later viewing.
Please note that the report data is saved at the time you run the report. Therefore, any modifications you may make to the report after it has been run (i.e., changing the subtotaling options when using a Cube Report) will not be saved in the Saved Report output.

Existing Saved Reports can be seen by navigating to Reports-->Saved Reports and will appear like the one below.

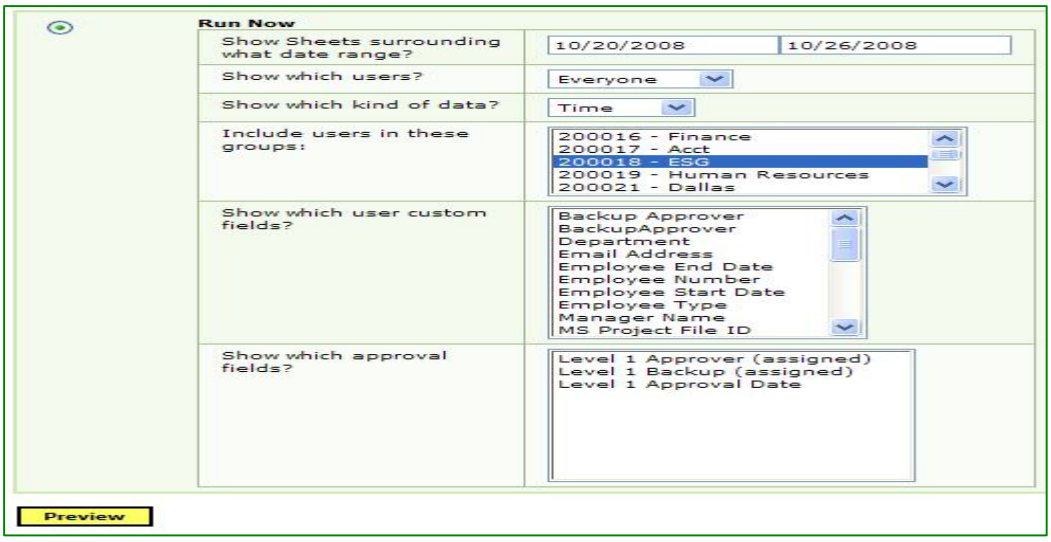
The list of saved reports, located at the top of this screen, includes all reports that you have saved, as well as any saved reports that have been copied to you by another user within your organization.

This screen includes the following information on each saved report you, as a user, have access to: report name, date run, report type, output format, and file size. This screen also provides access to the tools needed to copy or email saved reports to other users both within and outside the system database.

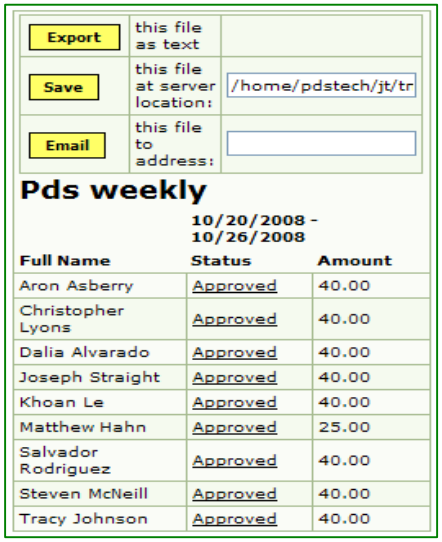
To view a previously Saved Report, simply select the report you wish to view from the list of Saved Reports and click the View button.

Sheet Status Reports

Sheet Status Reports are located under Reports-->Sheet Status Reports and allow you to create reports that will display the status of users' sheets for the date range specified. You may choose to display all users or users that were late submitting their sheets.



The date range is based on the individual days of the week and will only show the days indicated in the range. Use ctrl-click to indicate which groups, user fields, and approval fields you want to include on your report. Click the Preview button at the bottom of the screen to view the report.



Full Name	Status	Amount
Aron Asberry	Approved	40.00
Christopher Lyons	Approved	40.00
Dalia Alvarado	Approved	40.00
Joseph Straight	Approved	40.00
Khoan Le	Approved	40.00
Matthew Hahn	Approved	25.00
Salvador Rodriguez	Approved	40.00
Steven McNeill	Approved	40.00
Tracy Johnson	Approved	40.00

The example to the left includes the following information:

Time period description (PDS Weekly)
Time period (10/20/2008 – 10/26/2008)
Full name of the user
Current status of timesheet within the period
Total amount of hours

Use the Export or Email functions to save a copy of the report for reference.